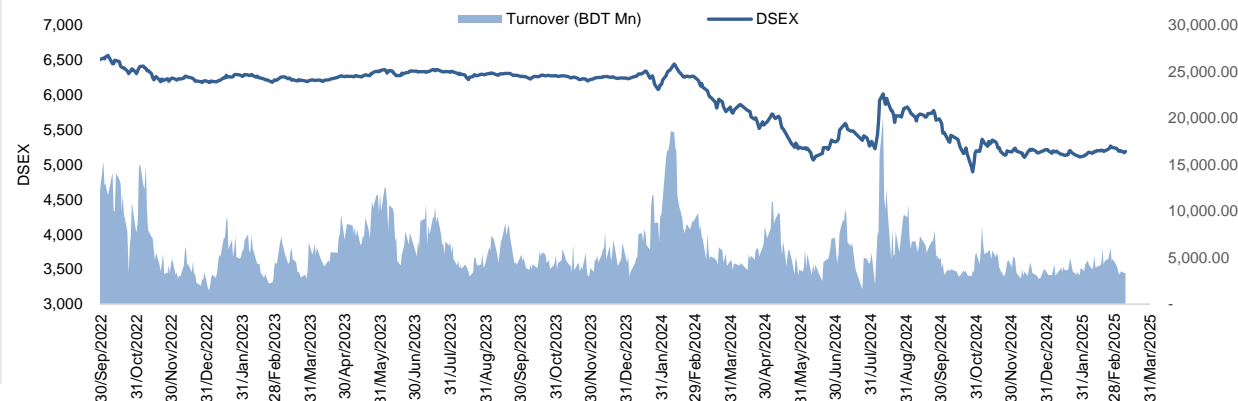


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.32%) gained 16.5 points and closed at 5,190.95. The blue-chip index DS30 (+0.53%), the Shariah-based index DSES (+0.49%), and the large-cap index CDSET (+0.16%) closed at 1,890.28, 1,162.13, and 1,046.09 points, respectively. Most of the large-cap sectors posted positive performance today. Telecommunication booked the highest gain of 0.44% followed by Pharmaceutical (+0.32%), Bank (+0.24%), Food & Allied (+0.19%), Engineering (+0.18%), NBF1 (-0.32%), and Fuel & Power (-0.62%), respectively. Block trades contributed 4.0% of the overall market turnover. Orion Infusion Ltd. (+5.4%) was the most traded share with a turnover of BDT 222 million.



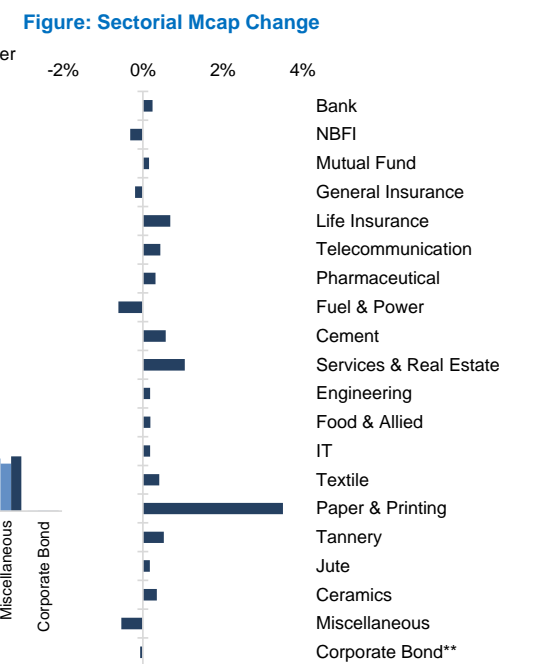
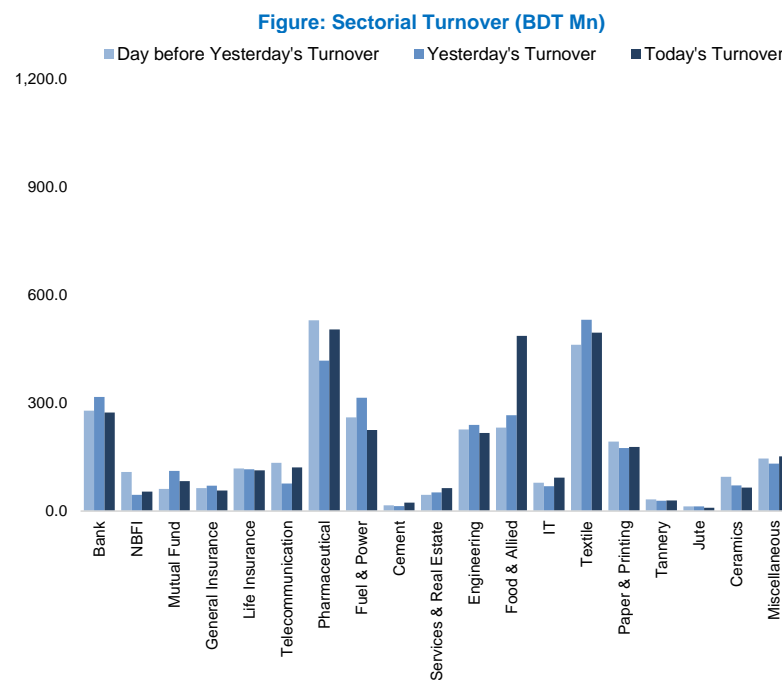
Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,190.95	5,174.44	+16.50	+0.32%	-0.5%
DS30	1,890.28	1,880.39	+9.90	+0.53%	-2.5%
DSES	1,162.13	1,156.44	+5.69	+0.49%	-0.6%
CDSET	1,046.09	1,044.41	+1.68	+0.16%	-1.9%

	Advanced	Declined	Unchanged	Total
All Category	174	137	83	394
A Category (Equity)	91	78	47	216
B Category (Equity)	48	17	15	80
N Category (Equity)	0	0	0	0
Z Category (Equity)	35	42	21	98
Mutual Funds	7	5	24	36
Corporate Bonds	0	1	1	2
Treasury Bonds	0	0	0	0

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,804,760	6,789,339	+0.2%
	Mn USD	55,777	55,650	
Turnover	Mn BDT	3,381	3,367	
	Mn USD	28	28	+0.4%
Volume	Mn Shares	105	124	-15.7%
No. of Trade		114,412	114,850	-0.4%

* Average Interbank Exchange Rate is BDT 122.00 as of Mar 10, 2025

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Market PE 14.8x
Market PB 1.2x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, and NBL

Sector Index	Closing	Opening	Points Δ	%Δ	No. of Companies	Mcap (BDT Mn)	% of Total Mcap	Turnover (BDT Mn)	% of Total Turnover	PE	PB	Top Twenty Market Cap	Mcap (BDT Mn)	% of Total Mcap	Turnover (BDT Mn)	PE	PB
Bank	1,434	1,431	+3.48	+0.24%	36	678,582	10.0%	273.4	8.4%	8.8x	0.7x	GP	441,278	12.4%	61.6	12.2x	6.8x
NBFI	1,076	1,080	-3.45	-0.32%	23	102,540	1.5%	54.0	1.7%	NM	NM	SQURPHARMA	192,803	5.4%	57.1	8.6x	1.5x
Mutual Fund	570	569	+0.88	+0.15%	37	26,177	0.4%	83.6	2.6%	NM	0.5x	BATBC	175,284	4.9%	15.0	10.0x	3.0x
General Insurance	2,507	2,512	-4.88	-0.19%	43	71,559	1.1%	56.8	1.8%	12.7x	1.1x	ROBI	149,805	4.2%	53.1	21.3x	2.2x
Life Insurance	1,745	1,733	+11.91	+0.69%	15	46,408	0.7%	113.1	3.5%	NM	NM	WALTONHIL	141,740	4.0%	1.2	10.7x	1.3x
Telecommunication	5,242	5,220	+22.71	+0.44%	3	614,706	9.1%	121.2	3.7%	13.8x	4.1x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Pharmaceutical	2,878	2,869	+9.12	+0.32%	34	545,689	8.1%	504.6	15.6%	13.2x	1.5x	BRACBANK	92,202	2.6%	74.3	8.3x	1.2x
Fuel & Power	1,109	1,116	-6.88	-0.62%	23	293,868	4.3%	225.0	6.9%	16.1x	0.6x	BERGERPBL	83,369	2.4%	1.4	24.3x	5.7x
Cement	1,827	1,816	+10.34	+0.57%	7	87,056	1.3%	23.7	0.7%	16.7x	1.9x	MARICO	75,077	2.1%	2.6	13.4x	9.9x
Services & Real Estate	1,019	1,009	+10.63	+1.05%	9	56,067	0.8%	63.5	2.0%	19.9x	0.4x	ISLAMIBANK	69,874	2.0%	4.7	15.0x	1.0x
Engineering	2,463	2,459	+4.45	+0.18%	42	277,844	4.1%	217.1	6.7%	12.6x	0.9x	RENATA	57,784	1.6%	6.8	19.5x	1.7x
Food & Allied	15,773	15,743	+29.60	+0.19%	21	288,597	4.3%	486.5	15.0%	15.7x	4.3x	LHB	57,256	1.6%	13.8	14.2x	2.8x
IT	1,991	1,987	+3.55	+0.18%	11	26,258	0.4%	92.7	2.9%	20.4x	1.7x	UNILEVERCL	48,359	1.4%	0.8	72.5x	19.8x
Textile	1,146	1,141	+4.67	+0.41%	58	119,347	1.8%	495.3	15.3%	81.1x	0.8x	ICB	44,924	1.3%	4.6	35.4x	1.0x
Paper & Printing	4,637	4,480	+157.25	+3.51%	6	20,949	0.3%	177.7	5.5%	NM	1.0x	DUTCHBANGL	44,820	1.3%	11.0	7.2x	0.9x
Tannery	1,956	1,946	+10.25	+0.53%	6	21,793	0.3%	29.5	0.9%	NM	1.6x	BXPHARMA	36,135	1.0%	31.6	5.6x	0.7x
Jute	12,406	12,385	+21.57	+0.17%	3	2,731	0.0%	9.4	0.3%	NM	NM	EBL	35,176	1.0%	4.3	5.4x	0.8x
Ceramics	397	395	+1.37	+0.35%	5	17,793	0.3%	65.4	2.0%	NM	1.1x	PUBALIBANK	33,548	0.9%	1.5	3.5x	0.6x
Miscellaneous	4,262	4,285	-23.14	-0.54%	15	231,446	3.4%	151.9	4.7%	94.7x	1.9x	POWERGRID	32,440	0.9%	3.9	NM	0.3x
Corporate Bond**	14,741	14,751	-9.59	-0.07%	16	32,286	0.5%	0.1	0.0%	NM	NM	CITYBANK	30,830	0.9%	8.5	4.3x	0.8x
Treasury Bond**	1,555	1,552	+3.02	+0.19%	234	3,197,264	47.3%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BPML	36.3	+10.0%	23.3	NM	0.5x
SAMATALETH	47.5	+10.0%	3.2	NM	3.3x
SALAMCRST	20.0	+9.9%	9.9	NM	1.1x
PRIMELIFE	39.1	+9.2%	13.6	NM	NM
TOSRIFA	22.1	+7.3%	14.6	41.7x	0.7x
SEAPEARL	38.2	+5.82%	28.7	NM	2.2x
NORTHRNINS	28.9	+5.5%	0.0	15.7x	1x
WMSHIPYARD	9.8	+5.4%	8.4	NM	0.6x
ORIONINFU	413.8	+5.4%	222.0	NM	27.0x
KBPPWBIL	164.9	+5.0%	73.7	NM	13.9x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	108,958	7.7%	8.6x	1.5x
ISLAMIBANK	74,730	5.3%	15.0x	1.0x
BEXIMCO	69,463	4.9%	NM	1.3x
BATBC	50,233	3.6%	10.0x	3.0x
WALTONHIL	46,773	3.3%	10.7x	1.3x
BRACBANK	46,489	3.3%	8.3x	1.2x
GP	44,708	3.2%	12.2x	6.8x
RENATA	32,968	2.3%	19.5x	1.7x
BXPHARMA	23,409	1.7%	5.6x	0.7x
PUBALIBANK	22,905	1.6%	3.5x	0.6x
CITYBANK	21,020	1.5%	4.3x	0.8x
LHB	20,953	1.5%	14.2x	2.8x
OLYMPIC	20,496	1.5%	15.7x	2.5x
ALARABANK	18,282	1.3%	14.5x	1.0x
BEACONPHAR	17,838	1.3%	49.7x	4.4x
PRIMEBANK	16,142	1.1%	4.4x	0.7x
ROBI	14,876	1.1%	21.3x	2.2x
UTTARABANK	13,699	1.0%	8.7x	0.8x
NBL	13,055	0.9%	NM	2.5x
BSRMLTD	12,852	0.9%	5.1x	0.5x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ORIONINFU	413.8	+5.4%	222.0	NM	27.0x
BEACHHATCH	122.1	+3.8%	207.2	35.8x	8.1x
AIL	69.7	+4.5%	170.5	26.2x	3.0x
LOVELLO	83.1	+1.2%	135.0	37.4x	6.6x
LINDEBD	1,114.8	+3.5%	94.3	2.8x	5.1x
HAKKANIPUL	67.6	+4.6%	86.1	NM	2.8x
BRACBANK	52.1	+0.4%	74.3	8.3x	1.2x
KBPPWBIL	164.9	+5.0%	73.7	NM	13.9x
GP	326.8	+0.9%	61.6	12.2x	6.8x
SQURPHARMA	217.5	-	57.1	8.6x	1.5x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
TUNGHAI	2.9	-9.4%	2.0	NM	NM
RENWICKJA	595.2	-6.6%	0.0	NM	NM
FIRSTFIN	3.5	-5.4%	0.3	NM	NM
DESCO	25.9	-4.8%	23.3	NM	0.7x
SOUTHEASTB	9.0	-4.3%	3.1	17.5x	0.4x
PLFSL	2.3	-4.2%	0.2	NM	NM
FAMILYTEX	2.6	-3.7%	1.3	NM	0.2x
TITASGAS	21.3	-3.6%	4.4	NM	0.2x
ARAMIT	165.9	-3.4%	0.3	44.4x	1.3x
ICBIBANK	2.9	-3.3%	0.3	NM	NM

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
BEACHHATCH	118.0	105.9	24.0	558	62.81
AIL	69.0	61.0	4.0	708	44.71
RELIANCE1	22.6	22.6	2.0	273	6.18
SEAPEARL	34.5	34.5	1.0	113	3.90
SINOBANGLA	48.5	46.5	4.0	72	3.40
ETL	8.8	8.8	1.0	325	2.86
KBPPWBIL	150.1	150.1	1.0	15	2.25
LOVELLO	90.2	81.0	2.0	25	2.11
JAMUNAOIL	175.0	175.0	1.0	10	1.75
ADNTEL	80.0	80.0	1.0	20	1.60

* NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.
 ** The base of the Bond Index starts at 100, starting from Jan 13, 2022
 Similarly, Treasury Bond Index starts at 100, starting from Oct 10, 2022

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade	Important DSE News
BEACHHATCH	118.0	105.9	62.8	558	24	SQURPHARMA Mr. Samuel S Chowdhury, one of the Directors of the Company, has expressed his intention to buy 1,500,000 shares of the company at prevailing market price (in the Public and Block Market) through Dhaka Stock Exchange PLC. within next 30 working days.
AIL	69.0	61.0	44.7	708	4	
RELIANCE1	22.6	22.6	6.2	273	2	SICL The Company will be placed in 'B' category from existing 'Z' category with effect from March 11, 2025 as the Company has reported disbursement of 3% Cash Dividend for the year ended December 31, 2023.
SEAPEARL	34.5	34.5	3.9	113	1	
SINOBANGLA	48.5	46.5	3.4	72	4	
ETL	8.8	8.8	2.9	325	1	
KBPPWBIL	150.1	150.1	2.3	15	1	
LOVELLO	90.2	81.0	2.1	25	2	
JAMUNAOIL	175.0	175.0	1.8	10	1	
ADNTEL	80.0	80.0	1.6	20	1	
SIBL	10.7	10.7	1.4	130	2	
ORIONINFU	383.2	370.1	1.1	3	2	
BESTHLDNG	19.2	19.2	0.7	35	1	
QUEENSOUTH	14.8	14.8	0.5	36	1	
PROVATIINS	34.4	34.4	0.5	15	1	
EGEN	21.4	21.4	0.5	24	1	
Total			136.3		49	

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
SUMITPOWER		0.0%	10.0%	Record Date	10-Mar-25
ROBI		0.0%	15.0%	Record Date	16-Mar-25
UNILEVERCL		0.0%	520.0%	Record Date	6-Apr-25
PIONEERINS		0.0%	25.0%	Record Date	7-Apr-25

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